



The Pensioner: *Looking Forward*

Welcome to the digital MPERS newsletter! *The Pensioner: Looking Forward* contains news, updates, and important information for active employees of the Missouri Department of Transportation, the Missouri State Highway Patrol, and MPERS.

Welcome, Commissioner Erdman!



MPERS would like to welcome Commissioner Warren K. Erdman to the Board of Trustees.

Warren is executive vice president-administration and corporate affairs for Kansas City Southern (KCS). Prior to joining KCS in 1997, Erdman served as chief of staff to U.S. Senator Christopher S. Bond of Missouri. He also served former Governors John Ashcroft in 1985 and Kit Bond in 1981 and 1984.

He is involved in numerous civic organizations. He is a former member of the University of Missouri Board of Curators from 2005 until 2012 and served as chairman of that board. He is a member of the UMKC Foundation board. He is a member of the Westminster College Board of Trustees and is also an alum. Erdman serves on the executive committee and board of directors of the Missouri Chamber of Commerce and Industry and the Kansas City Downtown Council.

Erdman and his wife, Jenny, live in Kansas City and are the parents of August and Audrey.

Mr. Erdman was appointed to the Board on April 5, 2023, replacing Commissioner Terry Ecker.

See You Soon in June!

If you are currently eligible to retire or will be before December 31, 2028, consider attending one of our half-day pre-retirement seminars in Jefferson City or St. Louis.

Can't make it to an in-person seminar? No worries, we have two virtual seminars offered this month as well!

Where:



MoDOT Central District Office
1511 Missouri Blvd, DW Muri Rom
Jefferson City, MO 65102

When:

Thursday, June 15 from 8:00 a.m. - 12:00 p.m.

Registration deadline:

June 7, 2023



Where:

MSHP Troop C Headquarters
3891 Technology Drive
Weldon Spring, MO 63304

When:

Wednesday, June 21, from 8:00 a.m. – 12:00 p.m.

OR

Thursday, June 22 from 8:00 a.m. - 12:00 p.m.

Registration deadline:

June 13 (for June 21st seminar)

June 14 (for June 22nd seminar)



Where:

Online via GoToWebinar

When:

2011 Tier members

Tuesday, June 6, from 8:00 a.m. – 12:00 p.m.

Closed Plan and Year 2000 Plan members

Thursday, June 29 from 8:00 a.m. - 12:00 p.m.

Registration deadline:

May 31 (for June 6th seminar-call MPERS to register)

June 25 (for June 29th seminar)

[Register for one of these seminars](#)

[I can't make it, show me the complete schedule.](#)



Active Employee Death Benefits

The May edition of *The Pensioner: Looking Forward* reviewed benefit payment options when you retire, but what happens if you pass away **before** you retire?

MPERS provides survivor benefits not only to the survivors of retirees, but also to survivors of active employees if certain criteria are met.

Active employee survivor benefits can be classified into two categories, duty-related and non-duty related.

Non-Duty-Related Death (must be vested)

Closed Plan, Year 2000 Plan, and 2011 Tier

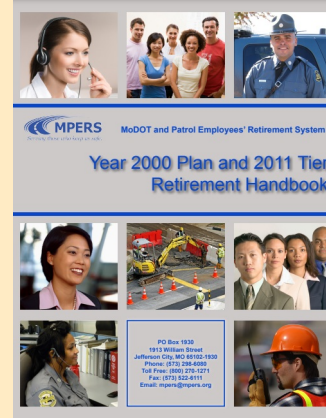
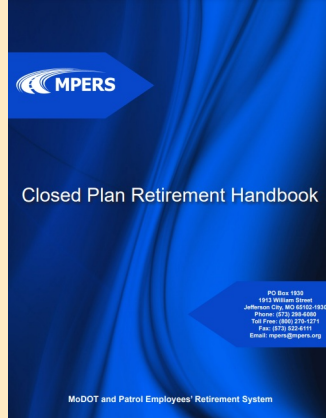
- The spouse to whom you are married on your date of death is eligible to receive a benefit for his/her lifetime.
- The benefit will be based on the monthly base benefit accrued as of the date of your death and calculated according to the joint & 100% survivor payment option.
- If there is no spouse, your surviving children under age 21 will receive 80% of your monthly base benefit, in equal shares, until that child reaches the age of 21.
- If your surviving children are under age 18, the benefit will be paid to the child in care of the surviving parent as natural guardian or to the legal conservator of the child until age 18. Thereafter, the benefit is paid to the child until age 21.
- If there is no eligible spouse or children, no benefits are payable.
- For 2011 tier members only, if there are no survivor benefits due, employee contributions will be refunded to the designated beneficiary or as allowed by law.

Duty-Related Death (no minimum service requirement)

Closed Plan, Year 2000 Plan, and 2011 Tier

- The spouse to whom you are married on your date of death is eligible to receive a benefit for his/her lifetime.
- The minimum survivor benefit for spouse and/or children is equal to 50% of the employee's final average pay.
- If there is no spouse, your eligible surviving children under age 21 will receive the benefit in equal shares until that child reaches the age of 21.
- If your surviving children are under age 18, the benefit will be paid to the child in care of the surviving parent as natural guardian or to the legal conservator of the child until age 18. Thereafter, the benefit is paid to the child until age 21.
- If there is no eligible spouse or children, no benefits are payable.
- For 2011 Tier members only, if there are no survivor benefits due, employee contributions will be refunded to the designated beneficiary or as allowed by law.

If you would like to dive a little deeper into survivor benefits, more information can be found in the [plan handbooks](#) below as well by contacting an [MPERS benefit specialist](#).



Legislative Update

Another legislative session in the books! Friday, May 12th marked the end of the 2023 Regular Session of the Missouri General Assembly.

There were several pieces of legislation introduced this session and several passed after a number of years in the making.

Senate Bills 20 and 75 were both omnibus retirement bills that each contained several retirement-related pieces of legislation. Most important for MPERS was the passage of the cleanup bill, which had been pending in the General Assembly during the past five sessions. The cleanup bill affects both MPERS and MOSERS, as both systems share many statutes and provisions, and is intended to simply clean up existing statutes by fixing typos, rewording unclear language, and modifying language where implementation was incomplete. It did not change any benefits just cleaned up the language to make it clearer.

In addition to the cleanup bill, Senate Bills 20 and 75 both provide for the staggering of the terms for MPERS' four elected trustees. After the next regular election in 2026, the active trustees who are elected will serve for two years instead of four, then face reelection during the next regular election in 2028 for that group. Following that slight irregularity, the elections for the four elected trustees will be staggered – two in 2028 and two in 2030, serving four-year terms thereafter.

Currently, Senate Bills 20 and 75 are awaiting the Governor's signature.

Retirement Deadlines

| Intended Date of Retirement | Step 1 <i>Notice of Retirement</i> Due at MPERS | Step 2 <i>Retirement Election Form</i> Due at MPERS |
|-----------------------------|---|---|
| January 1 | September 1-November 30 | December 31 |
| February 1 | October 1-December 31 | January 31 |
| March 1 | November 1-January 31 | February 28 |
| April 1 | December 1-February 28 | March 31 |
| May 1 | January 1-March 31 | April 30 |
| June 1 | February 1-April 30 | May 31 |
| July 1 | March 1-May 31 | June 30 |
| August 1 | April 1-June 30 | July 31 |
| September 1 | May 1-July 31 | August 31 |
| October 1 | June 1-August 31 | September 30 |
| November 1 | July 1-September 30 | October 31 |
| December 1 | August 1-October 31 | November 30 |

JUNE

Upcoming Events

- 6 - Pre-retirement webinar for 2011 Tier plan members, contact MPERS to register
- 8 - Mid-career webinar for Closed Plan/Year 2000 plan members, [register here](#)
- 15 - Pre-retirement seminar for Closed Plan/Year 2000 Plan, Jefferson City, [register here](#)
- 19 - Juneteenth holiday, office closed
- 21 - Pre-retirement seminar for Closed Plan/Year 2000 Plan members, St. Louis, [register here](#)
- 22 - Pre-retirement seminar for Closed Plan/Year 2000 Plan members, St. Louis, [register here](#)
- 22 - Board meeting
- 29 - Pre-retirement webinar for Closed Plan/Year 2000 Plan members, [register here](#)
- 30 - Deadline to submit step 1 -*Notice of Retirement* for August 1 retirement



We value your feedback!

What would you like to see in ***The Pensioner: Looking Forward?***
Send comments and suggestions to Julie.West@mpers.org.